

26th Annual Oregon Tax Institute

Cosponsored by the Taxation Section

Register at www.osbar.org/seminars (search for OTI26)



After a quarter of a century of presentations by outstanding tax experts, the Oregon Tax Institute continues that tradition with this year's curriculum. Paul Lee again brings his expertise and dynamic speaking style to Oregon, this time to discuss qualified small business stock (QSBS) exclusions. Professor Bruce McGovern returns with the latest federal tax developments. Special purpose trusts as a business succession planning technique will be examined, as well as key changes to Required Minimum Distributions (RMD) under the SECURE 2.0 Act. How to resolve state and federal tax collection issues continues to be a popular topic. Receive an overview of the Portland Revenue Division Appeals Board, along with practice tips. Transfer pricing controversies are increasing, so learn how to defend audits. A session on U.S. tariffs will bring you up to date on their current state.

Thursday's hosted bar and heavy appetizer reception is an engaging way to conclude the day and connect with your tax colleagues in a relaxed environment.

Thursday, June 4, 2026

9:55 a.m.–4:20 p.m. PDT

Friday, June 5, 2026

9 a.m.–4:30 p.m. PDT

Oregon State Bar Center

16037 SW Upper Boones Ferry Road, Tigard

CLE Credits: 10.75 General

Eligible for CPE credit

MCLE ID #: 133615

Register now at www.osbar.org/seminars
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In-Person Event

\$380 ONLD Member

\$460 Regular Registration

Meals, Thursday reception, and electronic materials are included with your registration.

50-Year and Active Pro Bono OSB licensees and Oregon judges and their lawyer staff – please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext.413 to register for the live seminar.



Questions or need help with registration?

Call or email the OSB CLE Service Center:
(503) 431-6413 or (800) 452-8260, ext. 413, or
cle@osbar.org

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Thursday, June 4

- 9:00** Registration and Morning Coffee Cart
(coffee drinks, tea, hot chocolate, and Italian sodas until 11 a.m.)
- 9:55** Welcome
- 10:00** Queueing-Up Quantum QSBS Exclusions
Paul Lee, *Consiglio Advisors LLC, New York, NY*
- 11:45** Lunch (included with registration)
- 1:00** Benefitting a Purpose: A New Approach to Business Succession
Steven Bell, *Ferguson Wellman Capital Management, Portland, OR*
Peter Koehler, *Founder, Stronghold Ownership, Portland, OR*
- 2:00** Transition Break
- 2:05** Required Minimum Distributions: Legislative, Regulatory, and Practical Updates
Anthony Hunt, *Miller Nash LLP, Portland, OR*
- 3:05** Networking Break
- 3:20** Avoiding Collection Quagmires: How to Manage and Resolve Tax Collection Issues at the State and Federal Level
Kathryn Meyer, *Kathryn Meyer Law PC, Alexandria, VA*
Priscilla Parrett, *Snell & Wilmer, Portland, OR*
- 4:20** Adjourn to Reception (hosted bar and heavy appetizers) (included with registration)

Friday, June 5

- 8:30** Late Registration and Buffet Breakfast
- 9:00** To Appeal or Not to Appeal? City of Portland Revenue Division Appeals Board Overview, Process, and Practice Tips
Adam Abplanalp, *CPA, Cobalt, Portland, OR*
- 10:00** Transition Break
- 10:05** Transfer Pricing Controversy is Rising: How to Defend Audits
Eman Cuyler, *Skadden, Arps, Slate, Meagher & Flom LLP and Affiliates, Washington, DC*
- 11:05** Networking Break
- 11:15** U.S. Tariff Update
David Glynn, *Holland & Hart LLP, Denver, CO*
- 12:15** Lunch (included with registration)
- 1:15** Federal Income Tax Update
Professor Bruce McGovern, *South Texas College of Law, Houston, TX*
- 2:45** Networking Break
- 3:00** Federal Income Tax Update (continued)
Professor Bruce McGovern, *South Texas College of Law, Houston, TX*
- 4:30** Adjourn

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Planning Committee

Mary Dougherty, *US Bank Wealth Management, Portland, OR*

Shannon Garcia, *Legal Aid Services of Oregon, Portland, OR*

Jessica McConnell, *Samuels Yoelin Kantor LLP, Portland, OR*

Connor Moran, *Samuels Yoelin Kantor LLP, Portland, OR*

Kate Roth, *Holland & Hart, Jackson, WY*

General Information

Cancellations: Cancellation requests must be received at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee. To cancel, please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413.

Tuition Assistance: Legal employer- or income-based tuition assistance may be available. Please email (cle@osbar.org) or call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 with a brief explanation of need no later than one (1) week prior to the CLE event date.

Dietary Restrictions or Accessibility

Accommodations: Please call (503) 431-6375 or (800) 452-8260, ext. 375, at least 72 hours before the date of the seminar.

Hotel Accommodations: Discounted rates are available at The Grand Hotel at Bridgeport, 7265 SW Hazel Fern Rd., Tigard, OR 97224. Call 503-968- 5757 / toll free 1-866-968-5757 and reference the Oregon State Bar rate or [click here](#) to reserve online.

Products

OTI26.CD

Audio CDs with electronic materials..... \$460

This seminar will be available on-demand after the live program. Please visit www.osbar.org/seminars and search for OTI26. On-demand access is available for 60 days after the date of purchase.

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